



High School Send Service Guide

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Parchment Exchange Service Overview

Getting Started:



1. School must register for Parchment Exchange
2. School Administrator must Import Student Records
3. School Administrator should send out Registration Codes

Transcript Workflow:

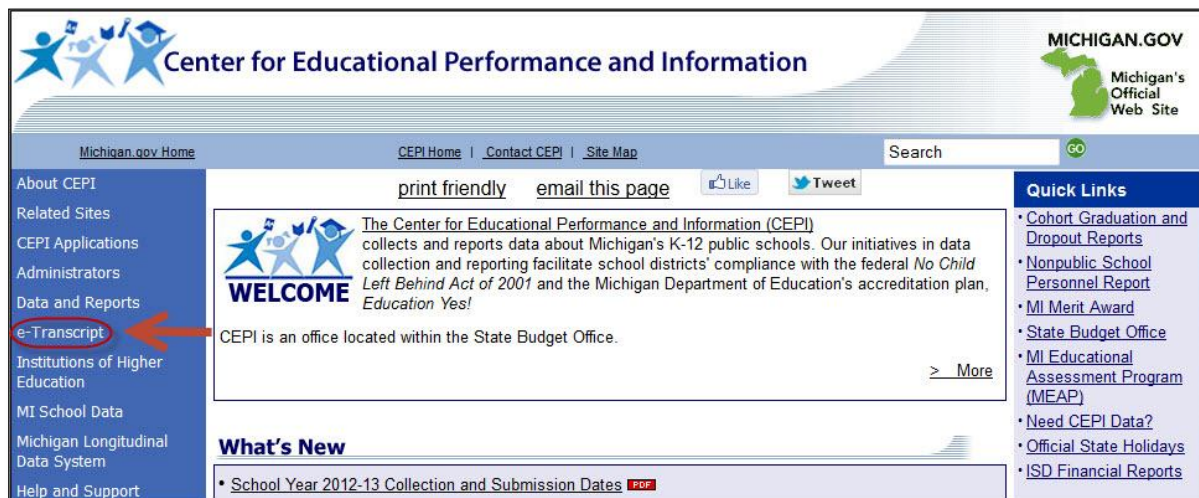


1. Students will register for Parchment Accounts, and place transcript requests online
2. School Administrator will Approve Transcript Requests
3. School Administrator will Upload Transcripts to Parchment Exchange
4. Parchment Exchange will deliver transcripts to the destinations indicated by the student during the initial request

Registration

To Register to Become a High School Sender of Electronic Transcripts:

1. Go to **www.michigan.gov/cepi**
2. Click on **e-Transcript** from the menu on the left



3. Click the **High School Registration** link from the **Registration** section



4. Select the **Begin Registration** link for **Districts** under the **Michigan e-Transcript Initiative** section
5. Search for your District
6. Provide e-Transcript contacts and fill in the applicable fields
7. Review and accept the Service Agreement

Import Student Records

Step 1: Prepare Student Roster for Upload:

1. Create a Comma Delineated (CSV) File from your Student Information System. It must contain the following information to successfully upload:
 - Student First Name
 - Student Last Name
 - Date of Birth (MM-DD-YYYY)
 - Student ID (*must be unique across all class years*)
 - Graduation/Leave Year (YYYY)
 - **Following Criteria is Optional:**
 - Street Address 1
 - Street Address 2 (if applicable)
 - City
 - State
 - Zip Code
 - Email Address

Step 2: Importing Student Records:



The screenshot shows the Parchment Exchange Michigan eTranscript web application. The top navigation bar includes icons for Send, Receive, Settings (highlighted), Members, Alerts, Support, and Sign Out. Below the navigation bar, the 'Import Student Records' tab is selected. The main content area is titled 'Settings' and contains a list of configuration options: Profile, Administrators, Send, and Import Student Records (which is highlighted). Each option has a brief description of its function.

1. Sign in to your **Parchment Exchange Account**
2. Click on the **Settings** icon
3. Select the **Import Student Records** tab
4. Click **Browse** to select your CSV from your computer
5. Click **Upload**
6. Click **Validate**
7. Select **Yes** or **No** for headers included
8. Click **Continue**
9. Map your data by selecting the appropriate fields from each drop down box
10. Click **Continue**
11. **Validation** will indicate errors in the data, and the row in which the error occurred
12. If no errors exist, **Import File**
13. For records that were invalid, correct the information and **Upload File** again.

Mapping your data:

Import Student Roster

Map the fields in your data file to the available field to import.

☐ Save Mapping ?

Column	Your Data	Available Roster Fields
1	Student First Name	Student First Name (required) ▼
2	Student Last Name	Student Last Name (required) ▼
3	Date of Birth	Date of Birth (required) ▼
4	ID #	Student ID (required) ▼
5	Grad Year	Graduation/Leave Year (required) ▼
6	Address 1	Address (required) ▼
7	City	City (required) ▼
8	state	State (required) ▼
9	Zip	Postal Code (required) ▼
10	Email Address	Email Address ▼

Error Log:

Import Student Roster

Current Status: Validated
Description: Dillon High School Roster upload
Date Imported: 08/10/2011 10:50:26 AM
Imported By: Roster Upload
Number Valid Records: 389
Number Invalid Records: 550

Error Log

Row #	Validation Error
2	Missing Graduation/Leave Year
3	Missing Graduation/Leave Year

Tips, Tricks & Notes:

- Creating and uploading a Tab Delineated File will result in issues with viewing the date of birth. Please create Comma Delineated Files instead.
- Please note that only an administrator with **Site Administrator** permissions may import student records.

Manage Registrations – Send Registration Codes

Step 1: Access Manage Registrations

1. Sign in to your **Parchment Exchange Account**
2. Click on the **Send** icon
3. Select the **Manage Students** tab
4. Go to the **Manage Registrations** page

Step 2: Manage Student Registration

1. Email Registration Codes *(selecting the Email Registration Codes button will create emails for all of your unregistered students)*
 - Select **Click here** in the Selected students box to edit the list of students you'd like to email Registration Codes
 - Customize email *(choose whether Parchment features are included in the email, and Add a custom message)*
 - Click **Email these 27 students now**
2. Print Registration Codes *(selecting the Print Registration Codes button will create handouts for all of your unregistered students)*
 - Select **Click here** in the Selected students box to edit the list of students you'd like to prepared handouts for
 - Customize handout *(choose whether Parchment features are included in the handout, and Add a custom message)*
 - Click **Print handouts for these 27 students now**
3. You may also send Registration Codes to a specific class by selecting any of the links in the **Unregistered Students** box
 - Select the radio buttons next to the students you'd like to send Registration Codes
 - Click **Email Registration Codes** or **Print Registration Codes**

Tips, Tricks & Notes:

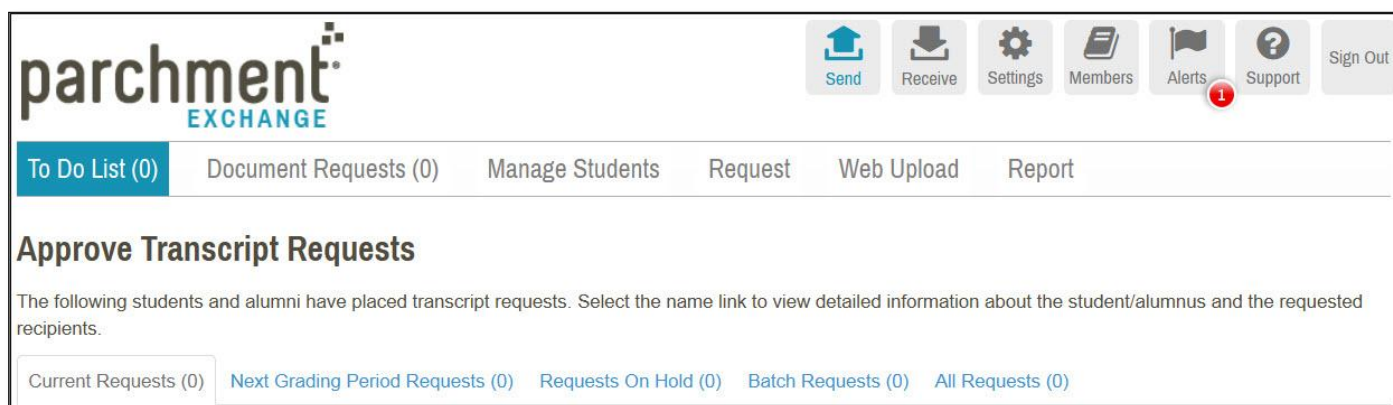
1. You may only email registration codes if you have student email addresses on the student roster *(that's uploaded into Parchment)*. If you do not have email addresses on the student roster, you should opt for printing Registration Handouts.

Approve Transcript Requests – To Do List

*Transcript Requests are processed from the **To Do List** of your Parchment Exchange Account.*

To Access the To Do List:

1. Sign in to your **Parchment Exchange Account**
2. Click on the **Send** icon
3. Click on the **To Do List** tab



Viewing Transcript Requests:

The **To Do List** page has five tabs to help manage the pending requests:

1. **Current Requests** (*requests that need to be processed immediately; requests are automatically added to this tab if a student requests a **Current Transcript**, or if the request is for an alumni transcript*)
2. **Next Grading Period Requests** (*requests that should be held until grades are posted for the next grading period; requests are automatically added to this tab if a student requests a **Next Grading Period Transcript**, or an administrator has placed the request on **Hold for Grades**. To immediately process requests on this tab, Select the **Approve** Action, and click **Submit**)*
3. **Requests on Hold** (*requests that have been placed on hold by a school administrator, with the exception of **Hold for Grades**.)*
4. **Batch Requests** (*displays batch requests generated by a receiving institution*)
5. **All Requests** (*complete list of requests from the previous three tabs*)

Viewing Destinations for Transcript Requests:

To view individual destinations for a student:

1. Click **View Destination** link underneath the student name for any request on any tab.
 - a. This will display the destination details for each destination, including Recipient Name and Delivery Method.
2. Click **Hide Destination** link to hide the destination information

Processing Transcript Requests:

1. Select the appropriate Action for each student's request:
 - a. **Approve** (*authorizes Parchment to release the transcript to the recipient(s)*)
 - b. **Hold** (*defer processing the request until some other action occurs. Parchment sends an email informing the student that their request(s) have been place on hold.*)
 - c. **Prepare Locally** (*confirm that you will be processing and sending the transcript from your office*)
2. Click **Submit** (*this will produce a printable **To Do List** of transcripts that need to be uploaded to Parchment Exchange and/or to be prepared locally*)

Printing to Parchment Exchange:

1. Go to your Student Information System
2. Open applicable student transcript
3. Select **Print**
4. Select the **Docufide Printer**
5. Click **OK**

Please Note:

1. Print each transcript **ONLY ONCE**
2. Print only **ONE** transcript per student (*regardless of how many destinations the transcript is being sent to*)
3. Only print transcripts from the **To Do List** generated after approving transcript requests
4. Do not print transcripts for requests that have not been approved yet (*our system does not match transcripts to requests that have not been approved*)

Placing a Request on Hold:

There are three options:

- **Student Hold** (*used when there is a general issue with a student's transcript or an issue that prevents the approval of any transcript request for this student.*)
- **Hold for Grades** (*used to hold a transcript request until the Next Grading Period grades are posted. These requests are moved to the **Next Grading Period Requests** tab until confirmation of the posting of grades.*)
- **Other** (*allows an Administrator to provide a personalized message to the student explaining why the request is being placed on hold. Any information entered here will be included in the email to the student informing them the request has been placed on hold.*)

Tips, Tricks, & Notes:

1. Requests on the **Next Grading Period Requests** tab are automatically moved to the **Current Requests** tab when an administrator confirms grades have been posted within your student information system.
2. The number of transcript requests in each tab is displayed on the tab.
3. Adjust the number of requests that should appear at one time using the **Requests Per Page** drop down box.
4. If a student has requested his/her transcript be delivered via FedEx for Overnight or Expedited Delivery, an airplane icon will display next to the student name, and the request will be at the top of the list under Current Requests.
5. When processing requests for a student, you have the option of selecting the same option for all destinations, or selecting different options for each individual destination by viewing the individual destinations.
6. If a student has requested an **Unofficial Transcript** to be placed into their parchment.com account, there are only two processing options: **Approve** and **Hold** (*refer to the **Student Registration and Transcript Ordering** user guide for more information about requesting an **Unofficial Transcript**.*)
 - a. When an administrator approves the transcript request, a clearly labeled **Unofficial Transcript** will be uploaded to the student's parchment.com account. The student can then view the transcript online, but **cannot send** the transcript anywhere.

Web Upload

Administrators can use the Web Upload functionality to send documents (not transcripts) to electronic destinations.

Step 1: To Access Web Upload:

1. Sign in to your **Parchment Exchange Account**
2. Click on the **Send** icon
3. Select the **Web Upload** page

Step 2: Sending Documents with Web Upload:

1. Click **Browse** in the **Upload Document** box to select the document on your computer
2. Select **Upload**
3. Enter the applicable student information in the **Enter Student Information** box (*use **Supporting Information** to identify any information the receiving institution might need to identify the student*)
4. **Select Document Type** by using the drop down list next to **Document Type**
5. **Select Destination:**
 - Select a Country using the **Country** drop down list
 - Select a State/Province using the **State/Province** drop down list
 - Select a destination from the list populated using the above search criteria
6. Click **Submit**

Tips, Tricks, & Notes:

1. You can only send documents to destinations that receive electronically
2. All sections must be completed before the **Submit** button will activate
3. Students are unable to place requests through Parchment for extra documents to be sent
4. **Request ID** will only appear if the Receiving Institution has placed the request for additional documents
5. **Web Upload CANNOT BE USED TO SUBMIT TRANSCRIPTS!**

Document Requests

*Receive Members in the Parchment Exchange have the option of requesting additional documents; these requests will appear in your **Document Requests** tab.*

To Access Document Requests:

1. Sign in to your **Parchment Exchange Account**
2. Click on the **Send** icon
3. Select the **Document Requests** page

Document Requests:

1. **All Requests** tab includes:
 - Guidance Report Requests
 - Letter of Recommendation Requests
 - School Profile Requests
2. To delete a request, select **Delete** in the College column
3. Use **Web Upload** to send additional documents to receivers

Reports

Reports allow School Administrators to look up and download important data pertaining to Transcript Requests and Fulfillment.

To Access Reports:

1. Sign in to your **Parchment Exchange Account**
2. Go to the **Send** icon
3. Select the **Report** tab

Identifying Components of Reports:

- Student First Name
- Student Last Name
- Receiver *(Transcript Destination; Institution, Person, etc...)*
- DID# *(Identification number assigned to each transcript request; used for tracking)*
- Class Of or Years Attended *(use to search for requests from students during a specific attendance period)*
- Date Requested *(date that a student made a transcript request)*
- Date Approved *(date that a transcript request was approved by a School Administrator)*
- Date Delivered *(date that a transcript has been delivered)*
- Document Status *(status of a transcript request; see below for status definitions)*
- Document Type *(use to search for a specific document type; Transcripts (Midyear), Letter of Recommendation (Teacher), etc...)*

Running Reports:

1. Fill in the applicable fields
2. Click **Search**
3. Export your search results to Excel by clicking on the **Export Report to Excel** link at the bottom of your search results, and selecting the **Download Report** link that pops up

Statuses and What They Mean:

- Pending Action by Sending School *(Student has requested a transcript; School Administrator must now approve the request)*
- Placed on Hold by Sending School *(Transcript Request has been placed on hold by a School Administrator)*
- Approved *(School administrator has approved Transcript Request)*
- Processing *(Transcript has been uploaded and is journeying through our internal process to its correct delivery form; Processing should not last longer than a few hours)*
- Printed, to be Mailed Shortly *(Transcript has printed at our Arizona Office)*
- Printed for Overnight Delivery *(Transcript has printed at our Arizona Office)*
- Delivered: Available for Download *(Transcript has been delivered electronically; Receiver must download transcript)*
- Downloaded, Pending Confirmation *(Transcript has been electronically delivered and downloaded, but not confirmed by the Receiver)*
- Complete: Processed by Sending School *(Transcript Request has been fulfilled by Sending School)*
- Complete: Mailed by Parchment Exchange *(Printed Transcript has been mailed via US Postal Service First-Class Mail)*
- Complete: Overnighted by Parchment Exchange *(Printed Transcript has been overnighted via FedEx Express)*
- Complete: Download Confirmed *(Transcript has been Downloaded and Confirmed by the Receiver)*
- Canceled *(Transcript Request has been Canceled)*

- Sent to CAO for Delivery (*Document has been sent to Common Application Online to be attached to CAO Secondary School Report*)
- Complete: Delivered by CAO (*Transcript has been delivered by Common Application Online*)
- Complete: Delivered (*Document has been delivered*)
- Complete: Delivered to Parchment (*Upload has been to delivered to Parchment*)
- Complete: Test Document Received (*Test Document has been uploaded and received*)

Understanding Search Results:

There are 10 data points for each search result; two per column.

1. Column 1: **DID#, Document Type**
2. Column 2: **Student Name, Document Information**
3. Column 3: **Class Of, Date Requested**
4. Column 4: **Date Approved, Date Delivered**
5. Column 5: **Receiver, Document Status**

Tips and Tricks:

1. Search criteria can be sorted alphabetically by clicking on the Headers in the top Column (ex: Click on **Student Name** to alphabetize your report results by student name)
2. You can view a transcript's pdf for 90 days from the date of upload by clicking on the **DID#** in the left hand column of your search results